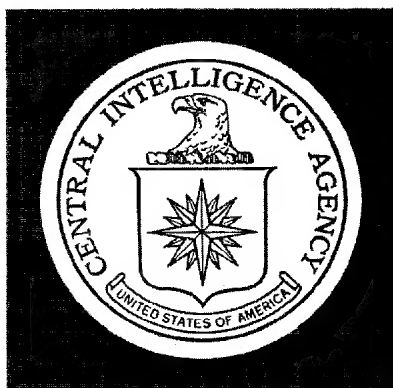


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Intelligence Memorandum

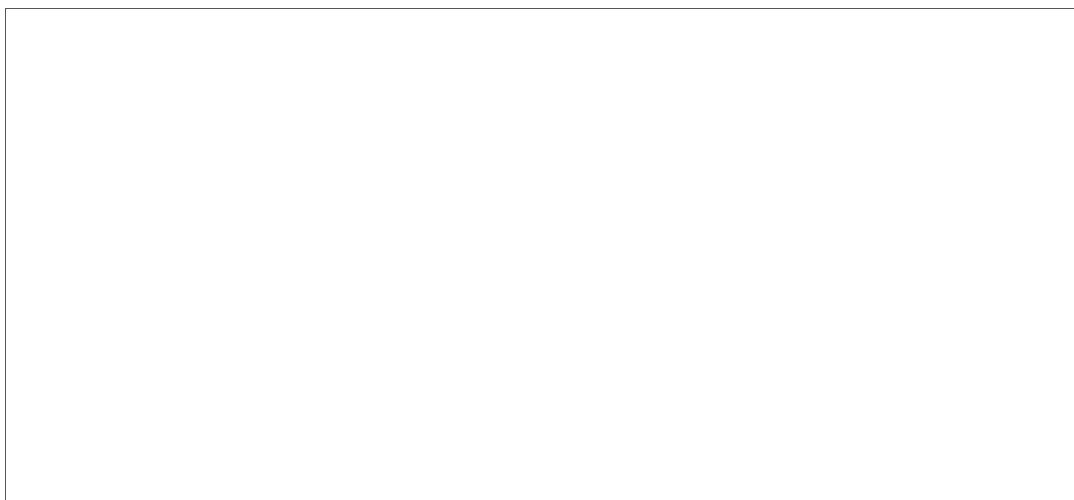
*Foreign Shipping to North Vietnam
During April 1968*

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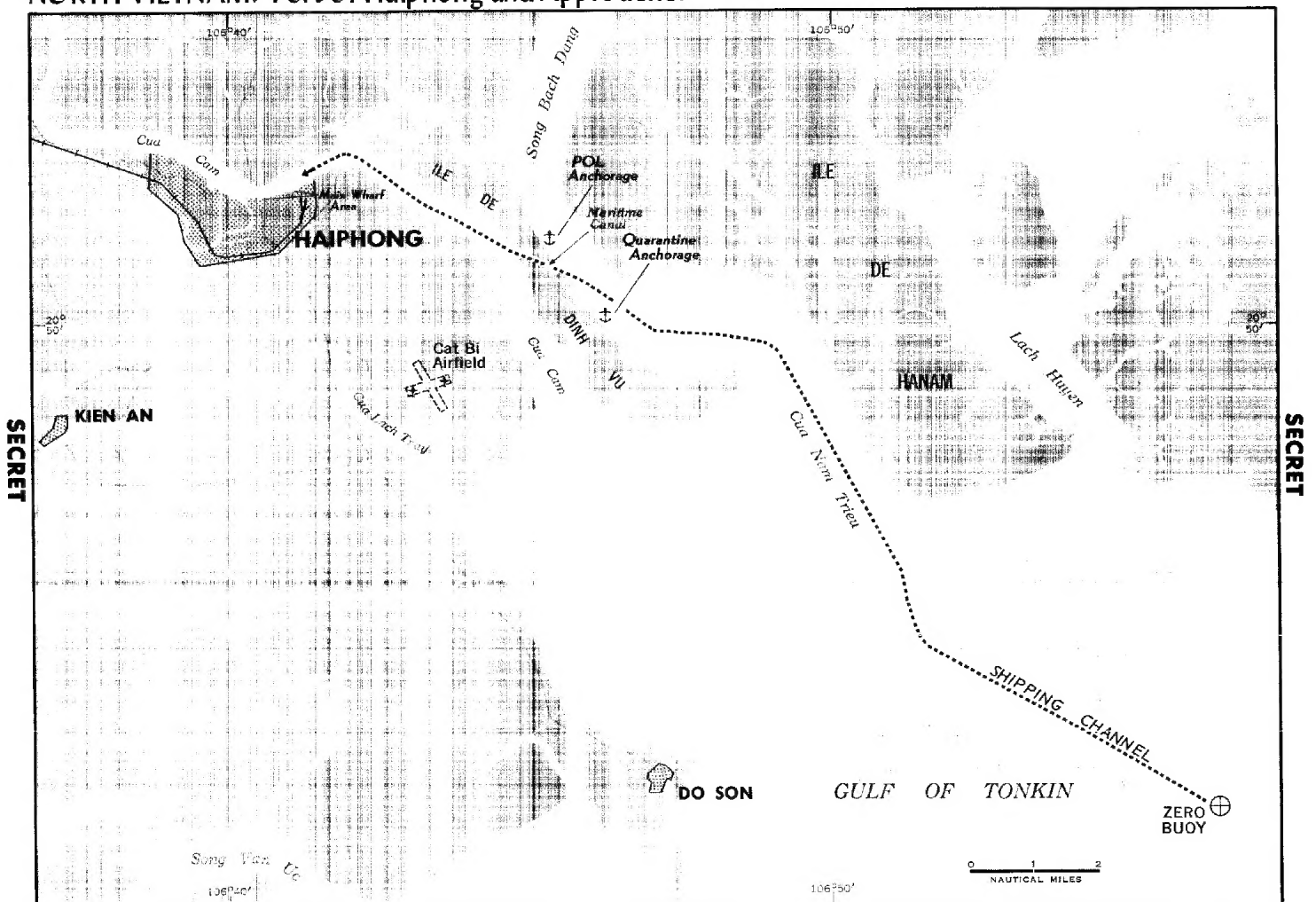
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Foreword

The data in this memorandum are preliminary and subject to modification as additional information becomes available. Significant changes may occur in ship arrivals and cargoes from Communist China and, to a lesser extent, in cargoes carried by ships of the Free World. Soviet and Eastern European ship arrivals and cargoes and Free World arrivals are not likely to be changed significantly. To reflect changes in previous reports, a table showing monthly arrivals, by flag, is included in this memorandum. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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NORTH VIETNAM: Port of Haiphong and Approaches



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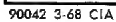
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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
May 1968

INTELLIGENCE MEMORANDUM

Foreign Shipping to North Vietnam During
April 1968

Summary

Ship congestion at Haiphong eased considerably in April as the restriction of US bombing allowed a quickening of unloading operations. The average layover time for dry cargo ships departing the port fell from 28 days in March to 19 days in April and some further improvement is expected in May. The movement of cargo inland from the port apparently did not accelerate, however, and the volume of cargo in open storage increased.

Ship arrivals and imports to North Vietnam continued at a high level in April, although they were down slightly from March. Forty foreign ships arrived with 152,400 tons of cargo, compared with 43 ships and 169,800 tons in March. Deliveries during the month included 45,700 tons of petroleum, 28 percent more than the record high of May 1967. There were no identified seaborne imports of arms or ammunition.

Arrivals of Free World ships in April were higher than the average for the first quarter of the year and were double the monthly average in 1967. Details on Free World and Communist arrivals are shown in Tables 1 and 2, Figure 1, and the following tabulation:

Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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Flag	March 1968	April 1968	Monthly Average	
			First Quarter 1968	1967
<i>Total</i>	43	40	39.3	32.2
Communist countries	<u>31</u>	<u>27</u>	<u>29.3</u>	<u>25.7</u>
USSR	20	18	18.0	15.1
Eastern Europe	3	1	2.0	2.4
Communist China	8	8	8.7	8.1
Cuba	0	0	0.7	0.1
Free World	<u>12</u>	<u>13</u>	<u>10.0</u>	<u>6.5</u>
United Kingdom	10	10	8.7	5.6
Other	2	3	1.3	0.9

Seaborne exports in April rose to 80,000 tons, the highest volume since March 1967. Coal exports, which had fallen in March because of congestion at the coal ports, almost doubled in April.

During the first four months of 1968 the number of foreign ship arrivals was the same as in the comparable period of 1967 but imports were 14 percent higher. As shown in the following tabulation, there have been significant increases in the volume of foodstuff and petroleum imports while fertilizer imports have dropped sharply:

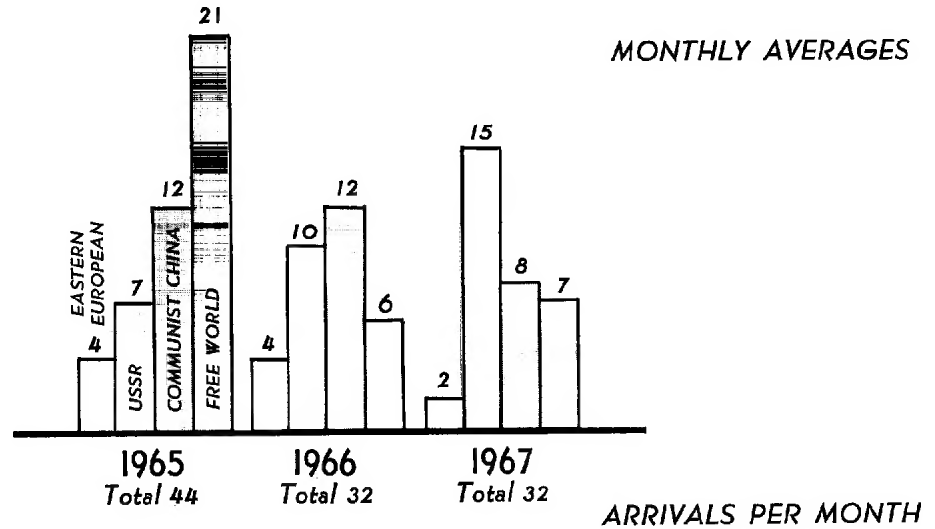
	Thousand Metric Tons		Percentage Change
	Jan-Apr 1967	Jan-Apr 1968	
<i>Total</i>	537.4	610.2	+14
Foodstuffs	113.8	180.4	+59
Fertilizer	100.9	59.1	-41
Petroleum	95.4	146.7	+54
Timber	8.1	8.1	0
Miscellaneous and general	219.2	215.7	-2

Free World ships carried 29 percent of the total imports in the first four months of 1968 compared with only 13 percent during the same period in 1967.

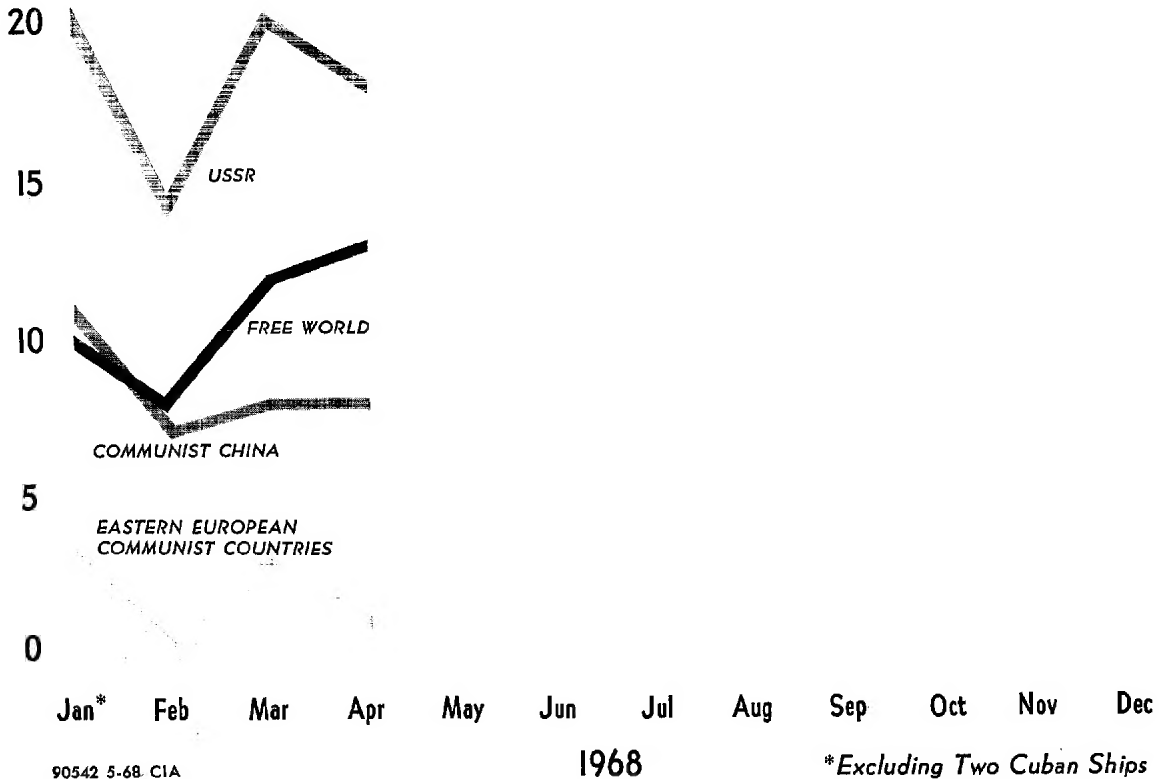
Figure 1

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North Vietnam: Foreign-Flag Ship Arrivals



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Situation at the Ports

1. Delays to foreign freighters in Haiphong were reduced considerably in April despite the continued high rate of ship arrivals and imports. Unloading operations in Haiphong (see the map) quickened immediately after the US bombing restrictions were announced. The average number of dry cargo ships in the port of Haiphong per day dropped from 23 in March to 19 in April, and the average layover time for dry cargo ships departing Haiphong fell from 28 days to 19 days. Large-hatch Soviet freighters from the Black Sea departed North Vietnam in April after stays of about four weeks, compared with stays of six to eight weeks for similar freighters that departed in March.

2. The acceleration of unloading operations was not accompanied by a comparable increase in the rate of moving cargoes inland from the port. Photography of 23 April (see Figure 2) reveals about one-third more cargo in open storage than was apparent in photography of 4 March. There was no appreciable change in the number of waterborne logistics craft adjacent to the commercial wharf area, but there was a large increase in the number of railroad cars.

3. The large Soviet-made suction dredge Zemlesos No. 8 was observed in Haiphong in mid-April for the first time since June 1966, and a total of 11 small ZRS-1 suction dredges and six associated pipe barges also were seen in Haiphong.* The Zemlesos No. 8 is the only North Vietnamese dredge that can operate in the channel approaches to the port. Its return to Haiphong, presumably from a safehaven in China, undoubtedly is related to the bombing restrictions. Other activity revealed by the April photography

* *Nine ZRS-1 suction dredges and five pipe barges are new since the photography of 4 March.*

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includes repairs to part of the berth area* and a probable extension of the new pier being built at the western end of the commercial wharves. The new pier probably will be more than 700 feet long, whereas early photography showed an extension of only 450 feet.

4. Congestion at the coal ports of Hon Gai and Cam Pha also was reduced in April. Turnaround time for ships loading coal was lowered, permitting a much larger volume of coal to be exported. Four of the 40 foreign ships that called at North Vietnam in April arrived at the coal ports: three ships in ballast (two Free World and one Chinese Communist) to load coal, and one Free World ship to unload packaged petroleum products. Another Free World ship unloaded part of its cargo of rice and beans in Haiphong and the remainder in Hon Gai.

Ship Arrivals

5. Twenty-seven Communist ships arrived in North Vietnam during April and carried 62 percent of seaborne imports. Soviet ships made 18 calls and delivered 46 percent of seaborne imports. Six of the Soviet arrivals were small tankers that delivered petroleum from Vladivostok to Haiphong and twelve were dry cargo ships (three large-hatch freighters from the Black Sea and nine smaller freighters from Vladivostok). The 22 Soviet ships that departed North Vietnam in April included five tankers in ballast bound for Vladivostok and 17 dry cargo ships -- eight with coal for Japan and Malaysia, five with general cargo for Singapore, one with general cargo for Vladivostok, and three in ballast.

6. Eight Chinese ships arrived in April and delivered 12 percent of seaborne imports. All Chinese arrivals originated from ports in China, and the six

* Rotted planking in several areas of the commercial wharves has been discerned in recent months from overhead photography.

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Figure 2

BERTH NO. 1 and NO.2-HAIPHONG

Ruthy Ann UK-HK

PROBABLE GRAIN SACKS

Shienfoon UK-HK

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departures during the month, including three with coal, returned to ports in China. One Polish ship, which belonged to the Chinese-Polish Shipbrokers Company, arrived with trucks, construction and electrical equipment, machinery, barge sections, and steel products from Eastern Europe.

7. Thirteen Free World ships arrived in April, three more than the monthly average in the first quarter of 1968 and double the monthly average in 1967. They delivered 38 percent of seaborne imports.* Ten were British-flag ships, all of which arrived from China and were under Chinese time charter.** One Lebanese and one Singapore-flag ship arrived at Cam Pha under North Vietnamese time charter to load coal. A tanker of unknown registry, also under North Vietnamese time charter, delivered 12,000 tons of petroleum from Rumania.***

Cargoes

8. Seaborne imports in April of 152,400 tons were 10 percent below the March level but were the same as the average monthly volume in the first quarter of 1968. Imports of 41,600 tons of foodstuffs in April (mostly flour from the USSR and rice from China) were off 10 percent from the monthly average of the first quarter, but petroleum imports of 45,700 tons (43,300 tons bulk and 2,400 tons packaged) set a new high. Petroleum shipments, which exceeded the previous record in May 1967 by 10,000 tons, came from the USSR (55 percent of the total), Rumania (26 percent), and China (19 percent).

* *This total represents the largest proportion of imports carried on Free World ships since June 1967, when 41 percent of incoming cargoes arrived on Free World vessels.*

** *These ships are owned by Hong Kong firms believed to be under the control of Communist China.*

*** *This ship, the Yvonne, had been under Greek registry until its owners sent it to North Vietnam. After repeated warnings by the Greek Government not to call at North Vietnamese ports, its registry was rescinded. The ship then unsuccessfully tried to obtain Cypriot registry. It finally arrived in North Vietnam in mid-April illegally flying the Cypriot flag.*

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9. Fertilizer deliveries, all from the USSR, fell sharply from March to 4,300 tons in April and were less than one-quarter of the monthly average in the first quarter. Shipments of 60,800 tons of miscellaneous and general cargoes were well above those in March and the average for the first quarter.* Almost two-thirds of the total came from Communist China and included cement, asphalt, gypsum, steel products, paper, and chemicals. General cargoes from the USSR included metal products, a 28-ton oil barge, cranes, and ploughs. Approximately 600 tons of clothing, shoes, bicycles, refrigerators, motorcycles, ambulances, blood, and food came as gifts from France aboard a Soviet ship.

10. Seaborne exports in April of 80,000 tons were nearly double those of the previous month and were the highest since March 1967. Coal exports increased from 38,200 tons in March to 75,700 tons in April. This was the largest volume exported since February 1967. Ship congestion at both coal ports, which had slowed loading in March, eased in April. By the end of the month, several ships had fully loaded 4,000-ton cargoes within three days of entering the port. The increased loadings of coal in April may also be attributable to further restoration of coal-processing facilities, electric power installations, and port cranes.**

* The commodity composition of about 40 percent of the miscellaneous and general cargoes imported in April has not yet been identified.

** US airstrikes on the Cam Pha coal facilities and the Hon Gai powerplant, which services both ports, resulted in a record low volume of coal exports in September 1967 of 9,300 tons.

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Table 1

North Vietnam: Foreign-Flag Ship Arrivals
January-April 1967 and 1968

Flag	January-April 1968						January-April 1967	
	January	February	March	April	Total Arrivals	Percent	Total Arrivals	Percent
Total	<u>46</u>	<u>29</u>	<u>43</u>	<u>40</u>	<u>158</u>	<u>100.0</u>	<u>158</u>	<u>100.0</u>
Communist countries	<u>36</u>	<u>21</u>	<u>31</u>	<u>27</u>	<u>115</u>	<u>72.8</u>	<u>139</u>	<u>88.0</u>
USSR	20	14	20	18	72	45.6	81	51.3
Eastern Europe	3		3	1	7	4.4	15	9.5
Bulgaria							4	2.5
Poland	3		3	1	7	4.4	11	7.0
Communist China	11	7	8	8	34	21.5	43	27.2
Cuba	2				2	1.3		
Free World	<u>10</u>	<u>8</u>	<u>12</u>	<u>13</u>	<u>43</u>	<u>27.2</u>	<u>19</u>	<u>12.0</u>
Cyprus	1	1			2	1.3	2	1.3
Italy			1		1	0.6		
Lebanon				1	1	0.6		
Malta							1	0.6
Singapore			1	1	2	1.3		
United Kingdom	9	7	10	10	36	22.8	16	10.1
Unknown flag a/				1	1	0.6		

a. This ship, the Yvonne, had been under Greek registry until its owners sent it to North Vietnam. After repeated warnings by the Greek Government not to call at North Vietnamese ports, its registry was rescinded. The ship then unsuccessfully tried to obtain Cypriot registry. It finally arrived in North Vietnam in mid-April illegally flying the Cypriot flag.

Table 2

North Vietnam: Tonnage of Foreign-Flag Ship Arrivals a/
March and April 1968, and January-April 1967 and 1968

Type of Ship and Flag	1968						1967	
	March		April		January-April		January-April	
	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons
Total	<u>43</u>	<u>203.9</u>	<u>40</u>	<u>191.0</u>	<u>158</u>	<u>760.2</u>	<u>158</u>	<u>772.9</u>
Dry cargo	37	176.7	32	156.3	131	650.0	139	702.6
Tanker	6	27.3	8	34.7	27	110.2	19	70.3
Communist countries	<u>31</u>	<u>145.6</u>	<u>27</u>	<u>122.5</u>	<u>115</u>	<u>550.1</u>	<u>139</u>	<u>679.9</u>
USSR	20	94.1	18	83.4	72	333.0	81	400.0
Eastern Europe	3	20.4	1	8.9	7	52.9	15	118.4
Communist China	8	31.1	8	30.3	34	145.4	43	161.5
Cuba					2	18.8		
Free World	<u>12</u>	<u>58.3</u>	<u>13</u>	<u>68.5</u>	<u>43</u>	<u>210.2</u>	<u>19</u>	<u>93.0</u>

a. The aggregate tonnage of ships calling does not necessarily reflect the actual volume of cargoes moving into and out of North Vietnam, but is of value as an indicator of relative changes in the volume of shipping.

Table 3

North Vietnam: Imports Carried on Foreign-Flag Ships a/
April 1968 and January-April 1967 and 1968

Flag	Thousand Metric Tons							
	April 1968						January-April	
	Foodstuffs	Fertilizer	Petroleum	Timber	Miscel- laneous <u>b/</u>	Total	1967	1968
Total	<u>41.6</u>	<u>4.3</u>	<u>45.7</u>	<u>0</u>	<u>60.8</u>	<u>152.4</u>	<u>537.4</u>	<u>610.2</u>
Communist countries	<u>31.2</u>	<u>4.3</u>	<u>24.9</u>	<u>0</u>	<u>34.5</u>	<u>94.9</u>	<u>466.2</u>	<u>435.0</u>
USSR	26.7	4.3	24.9		14.6	70.5	291.4	282.3
Eastern Europe					6.4	6.4	42.7	48.2
Communist China	4.6				13.5	18.1	132.0	93.2
Cuba								11.3
Free World	<u>10.4</u>	<u>0</u>	<u>20.8</u>	<u>0</u>	<u>26.4</u>	<u>57.5</u>	<u>71.3</u>	<u>175.2</u>

a. Imports include some estimates of cargoes, using methods which have proved to be highly reliable.

b. Including unidentified cargo of 25,000 tons. The volume of unidentified cargo will be reduced as additional information becomes available.

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Table 4

North Vietnam: Exports Carried on Foreign-Flag Ships a/
April 1968 and January-April 1967 and 1968

Thousand Metric Tons					
Flag	April 1968			January-April	
	Coal	Miscellaneous	Total	1967	1968
Total	<u>75.7</u>	<u>4.4</u>	<u>80.0</u>	<u>331.4</u>	<u>226.1</u>
Communist countries	<u>51.1</u>	<u>4.2</u>	<u>55.3</u>	<u>302.6</u>	<u>191.7</u>
USSR	32.7	3.3	35.9	154.4	83.3
Eastern Europe		0.1	0.1	40.6	2.5
Communist China	18.5	0.8	19.3	107.5	105.8
Cuba					Negl.
Free World	<u>24.5</u>	<u>0.2</u>	<u>24.7</u>	<u>28.8</u>	<u>34.4</u>

a. Exports include some estimates of cargoes, using methods which have proved to be highly reliable.

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